Getting Reimbursed by Graduate Student Association

**Mission:** In order to serve the student body of UNC-School of Education, The School of Education Graduate Student Association *actively seeks* to connect graduate students to funding for approved expenditures.

**Rationale:** Instructions are provided below to facilitate reimbursement for events and expenditures.

**Treasurer Role:** The GSA Treasurer will facilitate the process, but has *no control* over a) structures of SOE funding, b) reimbursement policies of SOE, or c) possible delay of reimbursement.

*If at any point the directions are unclear or you have a question, please contact the GSA Treasurer, Brendan Hendrick, bdhendri@live.unc.edu*

**Step 1:** Email the treasurer, asking him/her to complete a Payment Request Pre-Approval Form for you.

In this email include:
1. Full Name
2. Mailing address
3. PID#
4. The date, location, and general purpose of the event you are purchasing for
5. An estimate of the money you intend to spend (when in doubt, estimate on the high side. You will be approved to spend the amount you estimate. You can be reimbursed for less, but you cannot be reimbursed for more.

**Step 2:** Once the treasurer obtains approval from the SOE Business office, he/she will email you the Payment Request Pre-Approval Form (PRPA). This is your indication that the funds have been approved for use.
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**Step 3:** Make your purchases and **SAVE ALL RECEIPTS**

**Step 4:** Print your hardcopy of **Payment Request Pre-Approval Form** for submission

**Step 5:** Check to make sure your name, address, and PID# are correct. If they are not correct, please cross out and write in the correct address or PID#, BLACK/BLUE INK ONLY

**Step 6:** If your receipt differs from the amount you were approved for, cross out the amount, and write in the amount you spent (that your receipts can verify).

**Step 7:** Attach to the form with a paper clip or staple:
1. A list of the names of the SOE students who attended your event
2. Your receipt(s)

**Step 8:** Take the form with attached documentation to Mary McKendry in the SOE Business Office (106 Peabody). If she is not there, put the form in the basket on the door of Judy Perry’s office.
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**Step 9:** Email the treasurer to let him/her know the total amount you turned in your reimbursement form for.

**Step 10:** You will receive either (a) a check by mail within about 3 weeks, or (b) a direct deposit into the bank account associated with your student account.

SPECIAL NOTES:
* **Itemized receipts are necessary**, especially for hotel bills. Otherwise the business office cannot differentiate between your room rate and any room service you ordered.

* **Do not purchase from Staples!**
  Why? Because the SOE has a special contract with Staples. If we need supplies, check first with Mary McKendry in the business office, then, when possible, order them through the SOE business office (they get ~30% discount).

  **If anyone needs to buy supplies at the last minute, just don’t buy them from Staples. If someone does, they are likely to only be refunded at the rate the SOE would have paid (so ~30% less, yipes!)**